

TROUTWOOD APP



Own your financial future.



BUILD A PLAN

BUILD A PERSONALIZED FINANCIAL PLAN IN 3 EASY STEPS

Build Plan



Follow the blue "Build Plan" buttons to create your first financial plan.



Step 1. Profile

Fill out your profile

Enter profile data including age, years to invest, and location.



Step 2. Career

Choose a career path

There are over 900 careers to explore!



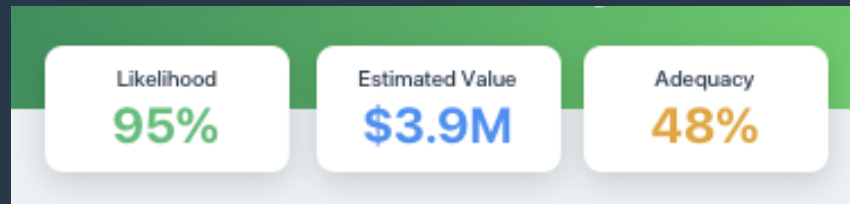
Step 3. Goal

Set your financial goal

Choose from a list of pre-defined investor profiles or input a custom goal.

LIVE YOUR PLAN

KEY METRICS BREAKDOWN



LIKELIHOOD

Answers the question: **Can I reach my goal?**

The likelihood of achieving this goal reflects the statistical probability of earning market returns based on the selected investment mix that meets or exceeds the level necessary to achieve your stated financial goal by the end of the plan horizon, given your 'My Save First Goal' savings amount.

ESTIMATED VALUE

Answers the question: **What is my goal?**

The estimated future value of your investments is based on your contributions and number of years you chose to invest.

ADEQUACY

Answers the question: **Is my goal enough?**

If you stick to your plan and hit your goal, this is how much of your income can be replaced after installing a spending policy*. The higher your score, the more of your income will be replaced.

*A spending policy helps guide your spending and the continued growth of your saving and investment dollars. By implementing a spending policy, you are taking an important step towards ensuring your savings last as long as needed.